



New Platform FAQ for eVA Buyers

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New Platform FAQ for eVA Buyers

General

What is the official name of the New System?

eVA!! Several tools and technology are used to support the eVA Program including AWS, Logi Analytics, and Ivalua

How long is the new contract term for eVA?

Initial term is 10 years with 2, five-year renewal options.

I heard eVA is making changes. What exactly is happening and when?

eVA is transitioning to a new platform the end of 2021. The new platform will bring next-generation technologies, tools and capabilities to make the purchasing process easier, more intuitive, and streamlined for all of our users.

Will my existing eVA account information be automatically transferred to the new platform?

Yes! We'll do all of the work for you. Your existing eVA account credentials will work when logging into the new platform.

What additional functionality will the new platform deliver? Requisition-to-Quick Quote "push technology"?

Yes. You will also be able to attach multiple documents at once on the requisition.

Is it a part of the new contract that the eVA internal training resources will be updated?

Yes! All eVA training resources will be updated.

Will there be educational videos available for various functions?

In addition to face-to-face training and train the trainer, will there be a library of self-serve training (video, CBT, etc.) that people can use asynchronously and we can deploy internally?

Yes, we anticipate providing a variety of learning resources, including short educational videos related to specific functionality/job functions (ordering, sourcing, receiving, etc).

There's concern over having plenty of time to train our end users, that are not "procurement" professionals and do not utilize eVA every day (knowing that many higher ed institutions are closed for the final few weeks of the year and end users will be unavailable)

We plan to begin some training in the August time frame and we are going to be as aggressive as possible on scheduling to get all of users trained.

General (Continued)

Ability to test the new system well in advance of go live so that we understand all process changes and problem points.

Absolutely! There will be opportunities for all entities to be involved in our user acceptance testing and 'train the trainer' initiative. If you are interested in helping out with testing, please send us your information using the "Feedback" section at <https://eva.virginia.gov/eva-transition-newsroom.html>

What will the cardinal/eVA relationship look like? Particularly, when we have a procurement vendor that is inactive in cardinal we are told to send their W-9 to eVA and somehow that interfaces into cardinal (I don't know all the particulars there). Will that still be the process? Will there be a way for us to submit/update that information?

eVA will continue the current relationship/process between eVA and Cardinal to allow suppliers (self-registered) or buyers (state-entered) to update respective accounts.

Will AEs play an active role in training, communication, etc?

Yes! The eVA team will continue to rely on the Account Executives to support relationships, communication, and training with our client entities. Additionally, we plan to offer a variety of training opportunities that would include instructor-led and self-paced learning.

Does reassignment allow the new individual ALL of the functionality of the original user?

Yes. The Contract will be reassigned and the new owner will have all access just like they would to a contact that they created.

Is the Chat for all eVA users or Agency only? Also, is the Chat FOIA-able?

Some aspects of this chat tool are still being finalized. This includes who you can chat with, who can use the chat, and whether it will be FOIA-able. As soon as these parts are finalized, we will update this document.

When is training anticipated to start?

October

Will all training is going to be self-training through the site?

No, we have instructor led, self-paced, fact sheets and other training resources that will be available.

Will there be a cleanup of vendors with multiple accounts?

Yes, this is currently in process

Contract & Supplier Management

Is the CTR number just for DPS awarded contracts? Will the agency Master Agreement number be replaced?

Contract numbers will be automatically assigned, much like purchase requisitions, orders, and solicitations. There will be a field to include an external contract ID, but the primary number throughout the system (requisition, catalogs, and suppliers) will be the eVA contract number.

Will there be an interface between the eVA contracts and MUNIS' requisitions?

There are many options to exchange data with eVA. The contract export is built and will continue to be available to allow you to export the contract details into any system you have.

With CRTs, will we be able to still use / assign our own contract number that will be used by our agency staff? How will this work with cooperative contracts (non-eVA using cooperatives)?

Contract numbers will be automatically assigned, much like purchase requisitions, orders, and solicitations. There will be a field to include an external contract id, but the primary number throughout the system (requisition, catalogs, and suppliers) will be the eVA contract #.

Regarding the system assigned contract number - does that mean we cannot assign our locality's specific contract number? We have a contract numbering system we use that identifies information in our contract numbers and this is one of the parts of current Sourcing & Contracting that I wish would change/improve (It may seem small to others but causes more hassle and additional time for us if we are chasing down alternate contract numbers that mean nothing to us and we have to relate back to another database to identify the contract).

Contract numbers will be automatically assigned, much like purchase requisitions, orders, and solicitations. There will be a field to include an external contract id, but the primary number throughout the system (requisition, catalogs, and suppliers) will be the eVA contract number.

How will eVA monitor the contracts for compliance with the Library of Virginia retention schedule?

Application data will be purged and we will be more successful at compliance with this toolset that is more integrated. Receiving is important!

Will the Supplier be able to update their contact names directly into the contract from the 'Supplier' sign on side?

Depending on the contract, there are easy ways for suppliers to update contact information.

Are the vendors going to be able to add the product information in the applicable tab? That seems to require a lot of data entry for the Buyer.

During the solicitation process the buyer can request the product information from the supplier and provide catalog information.

Contract & Supplier Management (continued)

How are you dealing with cooperative contracts with assigned numbers or contracts that are currently active with existing numbers? Is there an override to allow for the actual contract number to be entered? If not, while it would be clunky, is there going to be a cross reference from the system assigned number to the actual contract number?

The system assigned contract number will be available across the platform. As we work through conversion plans, we will determine how pre-existing contract numbers will be used in the system.

Is the Contract Officer or Contract Administrator supposed to initiate the Supplier Evaluation? Or is that up to the agency? And is the User who creates the Campaign usually the PO or the CA?

This is a business procedure that the Account Executives will work with the agencies on.

Is a "Campaign" issued by PO or by contract? I.e. an agency issues a PO against a contract, is the campaign for just the performance issue on that PO only?

We will be determining this at a later date and will be sure to reach back out to you with a response once a decision has been made.

Will the system contract number or the agency entered contract number be transmitted to the vendor, on the PO?

Contract numbers will be automatically assigned, much like purchase requisitions, orders, and solicitations. There will be a field to include an external contract id, but the primary number throughout the system (requisition, catalogs, and suppliers) will be the eVA contract number. There is also an "Active Contracts" link inside of the supplier's profile that they can click on to see their list of active contracts.

If the vendor is awarded contract # 12345, but then eVA assigns a standard number, what will be transmitted to the vendor so they will be able to understand the pricing to apply - actual contract number will need to be included in some manner - will end user have to manually type in comments?

The Vendor will receive a purchase order that already that includes the contract number.

Will DPS delegation approvals be integrated into the new req process? It would be nice if entire process was all done inline.

For day one, we are only taking approvals as they exist today. We can work to get this into the approval flow as we get past go-live.

Is the Pcard still a check box task?

It is located on a new tab on the requisition that will have a dropdown that shows all of your active pcards. Once the requisition is approved, the system will see that a pcard was used and create a PCO.

Contract & Supplier Management (continued)

Will there be the Buyer Inbox that comes into Procurement workflow, as it does now? The end-users do not select the procurement method at our agency, Procurement does that.

Yes, there will be a Buyer Inbox if you have existing rules for it and we have a new Buyer Inbox feature in the workflow that will receive basic requests or allows organizations to opt in to force buyer inbox review for anyone in that organization.

Can you enter unencumbered blanket orders against contracts?

Yes

What is the invoicing tab at the top of the user interface for?

Electronic invoicing is not going to be turned on for transition but is available functionality as part of the eVA platform that we launched as part of the transition.

P2P <Requisitions/Orders/Catalogs>

When the existing PR & EP's are converted will they retain their current RE & EP prefixes or will they be converted with the new prefixes?

Yes we will change to the new prefixes but we will also have the old information available for reference.

Will PO Categories and Transaction Codes be required in the new eVA? If so will eVA provide more detailed descriptions?

Yes. And, we can work to make those more detailed descriptions.

What is considered an Active Order?

An active order is any order that has been created/changed within the last two calendar years. All active orders will be transferred to the new system.

Will my labels transfer over to the new eVA?

No.

Does the new Reassignment feature include reassignments of buyer for PO management?

Purchase Orders can also be reassigned in the new platform

Currently, we have not been able to do a mass edit when adding a contract number in the contract number field. Will we be able to do this in the new generation/platform?

No.

Is chatting done inside eVA or is the email sent to the agencies email program? If inside eVA, how are users notified of a message?

Chatting is done inside eVA. We are still determining how users will be notified that they have a message. As soon as this information has been finalized, we will update this document.

<https://eva.virginia.gov/eva-transition-newsroom.html>

P2P <Requisitions/Orders/Catalogs> (continued)

Making sure I understand, the receiving view is a view of all of the agencies unreceived orders and not those of the individual?

Yes, the "Pending Receipts" default view shows all unreceived orders for the user's organization, not just those of the user. However, the user will be able to filter the pending receipts if they only want see their individual pending receipts.

Is it possible to limit which orders users can see/receive in the pending receipt list?

Yes, there are authorizations associated with viewing receipts based on your organizational scope which limits people to only seeing what they should see.

Will users have the capability to copy an existing PR that is in an inactive status in the new system?

No, however, users will still be able to view inactive orders through the data warehouse.

Can attachments be added to an order, without generating a new version of the PO? i.e. Might be using eVA as the official procurement file (eliminating the paper file).

No, Purchase Orders will still be versioned. However, if you are an approver in the approval flow with a role that allows you to make changes you will be able to add an attachment without a new version being created.

Can Cardinal coding be changed on an order, without generating a change order?

This functionality is possible in the new platform, but this ability is role-based as it is now.

Can you go over BSO changes again, did you say that our Reps would still be involved in any changes?

Yes, we anticipate that all organizations will still be going through their Account Executives to request changes to BSOs.

Will the new system allow for over-receiving?

Yes.

As an approver, will there be a way to "send a PR back" to the end user without denying the order? Also, will there be a way to make changes to the PR and not kick the approval flow again?

There will not be an option to send back without denying; however, you can use the chat feature to ask that user to make the applicable changes. With regards to making changes as an approver, this functionality is possible in the new platform, but this ability is role-based as it is now.

Sometimes end users have a hard time picking out the commodity/NIGP codes on non-catalog orders. Will there be any changes on how this is done?

No, you will still need to select the correct NIGP code.

P2P <Requisitions/Orders/Catalogs> (continued)

Is there an estimated time frame where we may be able to address any potential necessary customization in order to interface with our financial systems? I.e., if a purchase order contract number reference is not able to be a free-text option within the order and that data is accepted in the feed from eVA to our system, or if there are other mismatches. We realize that a "vanilla" product will be implemented at Go Live; however, the availability of correct BizTalk files is not an option for us.

Our current plan, to reduce risk to integration agencies, is to have very minimal impact to the agencies and little to no changes to what is provided to the agencies through BizTalk.

Since there is now a concern with how labels will transfer over, I also have questions about user "Folders" that have been created based on those labels. Will the folders remain and still have the filed items present or will users lose their folders and saved reqs/orders?

Similar to labels, folders will not transfer to the new system.

Can approvers make changes to requisitions without it going back through the approval flow?

This functionality is possible in the new platform, but this ability is role-based as it is now.

Does Delegation of Account replace Custodial Care? Or is there still a need to assign Custodial Care?

Reassignment of Work replaces Custodial Care.

Will the new eVA system talk to the state accounting system (Cardinal)? If I'm paying an invoice, which is a partial payment against a Purchase Order, the payment should be reflected on the PO showing the net amount after the payment has been made.

While the new platform will talk to Cardinal, the invoicing module is an advancement that will be implemented after the go-live date.

If your agency has custom options in the header (summary) area now will all of those be available in the new system? For example, we have a check box to mark orders as a blanket order.

In the new platform there is an option to have what is referred to as an "open" purchase requisition. It allows you to generate multiple order "releases", without recreating a new purchase requisition each time.

How does Reassignment of Work handle internal delegated authority controls?

In the new platform, you will be able to delegate work on a short-term, or a long-term basis depending on your needs. You will be able to reassign individual transactions to different users. You will not be able to split a single transaction between multiple users.

Requisitions in composing status at time of transition – will these requisitions automatically migrate with data into new platform and remain in composing status?

No, requisitions in composing status will need to be submitted and processed. Requisitions in composing status at the time of conversion will not move to the new platform.

P2P <Requisitions/Orders/Catalogs> (continued)

For users who have multiple P-cards in eVA, will they be able to select a default card in their account?

Yes. Users can set a default card on their user profile and can store one or more P-Cards as part of this user profile.

How will On Behalf Of (OBO) orders be managed (if different)?

You will still be able to do an order on behalf of another buyer.

In the approval flow, is there an opportunity now to request a choice for "needs more information" or other flags for return to the user rather than just a "deny" button?

We're still in the design phase and will be discussing this feature. Stay tuned!

Will there a way to show an order is a standing order and the quantities are not all to ship at once? Maybe a button like the one used for split coding but you can add dates and quantities. We have a lot of vendors who use automatic fill systems and as long as the part number is correct it pulls the quantities and just fills (orders like this are never touched by humans) so in this case all the notes about don't fill or standing order do not matter.

In the new platform there is an option to have what is referred to as an "open" purchase requisition. It allows you to generate multiple order "releases", without recreating a new purchase requisition each time.

If all vendors in the eVA database will be required to receive electronic orders, will they also be required to accept payment within the platform or will that be identified as it is now or in some other fashion within their vendor profile?

Will this impact vendor registration (i.e., self-registered vendors versus state-entered vendors)?

I would clarify that vendors are not required to receive electronic orders in as much as the creation of a vendor account in the new platform provides an order delivery and retrieval area. The acceptance of P-Card payments is still an option that is selected within the vendor profile. Entities will still have the option to 'state-enter' vendor accounts.

Order delivery will be electronic in the new platform, how will Suppliers who are paper-based/technology limitation be able to receive their orders?

PO reports you rely on will continue to be available. Therefore, you may leverage a report that can be printed and provided to your supplier. We will also explore other opportunities throughout the design phase.

P2P <Requisitions/Orders/Catalogs> (continued)

Will there be any changes to how punchout catalogs are managed within the eVA platform? Specifically, in reference to change order functionality and parameters for those functions, which has been an ongoing issue in terms of duplication or other order errors, will there be more guidance or failsafe options provided to vendors or will these still remain essentially "plug & play" connection within eVA, where responsibility lies solely with the vendor?

The vendor will still need to allow change orders on their side. We encourage all vendors to allow change orders. As we are still in the design phase we are looking into how we handle change orders when the vendor does not allow or are not capable of having the change order functionality on their punch out catalog.

Reporting

Will any current user-created folders, saved searches or saved reports be transitioned over into the new system? What about scheduled reports?

User created folders and saved searches cannot be transitioned. Favorited and scheduled reports will transition as the new eVA platform will continue to use the Report and Resource Center. Creating ad hoc reports will also still be supported in the new system.

Talk to us about reports please? Especially the tracking report for the buyer's use, such as tracking the day to day update for the requisitions which is not available on the current platform!

The Browse Orders page has several features that will allow you to sort your orders and export. This specifically will be further explored via "widgets" that will be available throughout the tool.

Sourcing

Will we be able to add suppliers to a solicitation? What about inviting non-eVA registered Suppliers?

Yes, you will be able to invite additional registered or un-registered suppliers to bid on a solicitation. Suppliers will need to register to respond online.

When adding "standard" documents for your agency, can you set a standard upload so we don't have to upload for every solicitation?

No.

How is someone supposed to differentiate between Sourcing and Contracting, VBO, and the new tool?

Sourcing and Contracting and VBO Buyer will no longer be available. We are excited to offer a single sourcing tool to meet all eVA users' needs.

<https://eva.virginia.gov/eva-transition-newsroom.html>

Sourcing (continued)

For general documents what control will delegated institutions have?

After the transition, we will explore expanding entities ability to manage general and program documents.

What happens if you enter a schedule and don't follow it?

The schedule is your project plan. You may update at any time. This is a tool for you to monitor your progress.

Typically, my agency uses consensus scoring and a consensus document so that there is no data that points to a particular evaluator. Wondering how the discussion tab can fit into that model. Is this a mandatory tab?

Discussions tab is not mandatory, but we will need to explore further if that's the best place for evaluation info. The consensus scoring information can be recorded in the Questionnaire Evaluation.

Will the tool allow external agencies (OAG and/or VITA) to approve the project in S & C?

If that is determined to be a necessary business function, the tool would support external agency approval.

Must all internal users (for collaborative processes) have access to eVA? Many typical evaluators at our agency would not typically have eVA access.

Surveys can be distributed to users outside of eVA to collect their evaluation information without needing an account but a user with eVA access would have to enter the results for electronic evaluation and collection purposes.

Is all data real time, vendor/supplier status?

Yes.

If it is desired to use handle the scoring/evaluation of an RFP, and the contract, etc., can the final documents be uploaded?

Yes. Additional documentation can be uploaded.

How those documents are integrated into the solicitation. For example, how Special Terms and Conditions would be included in the new module compared to the current Sourcing and Contracting Module.

Standard attachments, like General Terms & Conditions, will be added to the documents library for you to include on your solicitation. This will be attachment driven.

Functionality that allows for download of VBO and QQ notifications versus print only?

Yes.

Sourcing (continued)

Just as the CW eVA Team has been given the option to customize the out of the box package offered by Ivalua, that same consideration should also be provided to agencies to most efficiently function within our unique organizational structures and needs.

We look forward to exploring customization with individual entities after go-live.

Would also appreciate a 'preview' of what our end users will see (not just a central procurement perspective).

Please take a look at the P2P/Catalog Preview
https://www.youtube.com/watch?v=wBwjyla_04I

Must you use ALL features (tabs) within a particular event/project?

The Prepare RFX tab contains many of the same required fields you are accustomed to in QQ, VBO Buyer or Sourcing & Contracting. Tabs like Schedule and Team Members are optional features (tabs) to help you through the procurement process.

You mention workflow availability for QQ, what about a small purchases and standard sourcing events?

Workflow will be available for small purchases, please check out the P2P/Catalog Overview for more info: https://www.youtube.com/watch?v=wBwjyla_04I

Is the doc library specific to each agency?

Though we are still working on the design of this, there will be some documents relevant to all solicitations, and the document library will offer each agency to upload their own documents as well.

Is collaboration only within your agency or will it be able to be done across agencies?

Collaboration is available across the eVA buying community.

Will we be able to search a Sourcing Project by vendor name? That would be extremely helpful.

Yes. The advanced filter feature allows you to search by supplier. Within the search results, you can identify those that were solicited and/or selected.

Will there be capabilities similar to our current Queue Manager functionality in the new tool?

Approvals for issuing solicitations, if considered a business need by an entity, will be built out with entities after go live.

The sourcing documents tab is where we will upload project contracts and change orders.

Contracts documents will be uploaded in the Contract record. Change orders are automatically linked to the contract record.

Sourcing (continued)

For the Suppliers tab - will the SWaM/DSBSD data be updated "real time" or overnight, etc. so the data is as accurate as possible?

The SBSD data will continue to be updated overnight. SWaM information will be visible while you are working on a sourcing project.

Does Sourcing & Contracting generate a Grand Total price, if entering individual line items for pricing in the solicitation?

Yes, it just depends on how you leverage the tool.

Any chance to switch online the PR into any form of bidding process like QQ or so?

Yes. Sourcing events will begin with a Purchase Requisition. Users will be able to take a PR and advance that to a Quick Quote or other opportunity type (IFB, RFP, etc).

I heard there's an envelope feature available for advanced sourcing. What is that exactly?

This feature allows you to organize supplier responses, similar as you do now, by sections specific for suppliers like general information, pricing, and technical/scope. This also aids in distribution of material to your evaluation committee.

Will the award process for a solicitation posting be configurable and not "force" entities using alternative contract management systems to use eVA's tool? Also for those agencies who maintain their own contract management systems, will there be an ability to effectively use the sourcing functionality SEPARATE of the contracting module, especially since it's been communicated that the original VBO will be eliminated?

Solicitation/Procurement awards are not made by creating a "contract record" in the new solution. Awards are created within the solicitation itself and would not "force" anyone into eVA's contract management tool.

Effective July 1, 2021, the posting of contracts to eVA is a Code of Virginia requirement for state agencies. Please contact your DGS Account Executive or refer to PIM39 and the revised APSPM for additional details. Continue loading your required contracts now so you can focus on learning the new functionality when that time comes. All contract data in eVA when we fully transition to new tools will be moved for you and available to you in the new contract management tools.

We only publicly post solicitations, what does this mean for us?

The new platform sourcing tools still support the same ability to seamlessly publicly post your solicitations on eVA's website public posting page, VBO—Virginia Business Opportunities.

Will paper responses still be supported?

Yes!

Sourcing (continued)

In regards to the Solicitation data from original VBO; How will this data appear and how many years of data will continue to be made available publicly?

The solicitation data from the original VBO will continue to be publicly posted on eVA.

DGS states that the new platform sourcing tools will support the same ability to publicly post solicitations on the eVA website public posting page VBO. Does the solicitation have to be created with the sourcing tools to post on VBO or will we be able to post our solicitations as we do now (upload documents or links)? Can we transition to the new VBO posting platform now? If yes, is there training available?

Yes, the solicitation has to be created with the sourcing tools in the new eVA platform to post to VBO. The new sourcing module will become available when we transition. The new eVA platform will continue to support the use of links and documents. Training will be available starting in early Fall.

DGS has said all existing eVA account information will be automatically transferred to the new platform. If an account doesn't currently have access to the Sourcing & Contracting Module, will they still not have access on the new platform?

Yes the same access that a user previously had will transfer over to the new system. This will be the same for areas they did not have access to.

Will a buyer be able to run a high-level report for 'campaigns' for a supplier to use for their due diligence prior to award of a new contract?

We will be determining this at a later date and will be sure to reach back out to you with a response once a decision has been made.

Supplier Support

Will there be an improved relationship between CVG and the eVA vendor database? i.e., if the vendor self-registers and submits the IRS or COV W-9 but completes it incorrectly and CVG recognizes a TIN mismatch, will CVG communicate that to eVA to have the vendor update it? Or will eVA validate (IRS TIN match) W-9s at the time of vendor self-registration before the registration is approved?

eVA will continue to validate TIN with the IRS before a vendor is made active. At go live, we will ensure that eVA sends vendor information over as we are currently. Additionally, we are looking into any improvements that can be made between the CVG database and eVA.

What communications have been shared with vendors about the transition? Especially punchout vendors?

Existing catalogs will be reloaded, to not be a big lift for our suppliers.

Will State entered vendors come over when the vendors are transferred to the new platform?

Yes.

While we may as agencies/authorities/higher ed institutions, etc. may be targeted to get training and we appreciate that, what are the plans for vendor/supplier training? This may be a learning curve for them so they may need training. Are we as agencies, etc, expected to train our vendors/suppliers?

Entities will not be expected to train suppliers. Training will be offered to both Buyers and Vendors. We have already started to engage our Suppliers to inform them about what's coming and build training/communications to allow them to be just as ready as our Buyers for this transition. See the eVA Transition Newsroom for more information.

User Management

What is timeline for DGS/eVA team to identify Users, BSOs and workflows for removal/adjustments to current workflows?

If removal/adjustments are needed they should continue to be coordinated with your entity security officer and/or your DPS Account Executive. The cut-off date will be determined at a later time in the planning process. Any removal/adjustments are driven by the entity. If no changes are made/needed to your existing setup your existing setup will be converted into the new platform.

What access will buyers and contract officers using have? Will current eVA access be used as the base line for access determination in the new eVA platform?

Current eVA module access will be used to determine module access in the new eVA platform.

In evaluating how the BSO is currently structured and how we originally added our user community one by one into the system, will we need to rebuild them or will that data be imported from the current platform? How will making changes to the BSO groups look and will this be structured similarly in the new system? Will any of our data files or vendor data tables need to be rebuilt in the new system or will they import in their current format?

We will be implementing the current BSO system into the new organizational structure. Changes to the BSO groups will still be structured similarly with an additional level in the organizational structure to allow for further delineation if needed. The current plan does not anticipate required changes to entity data files or vendor data tables.

Will there be a bulk load of eVA Users, budget codes and BSO's into the new eVA?

Yes, bulk load functionality will exist. The template will change but the functionality will be available. Existing user, accounting, and workflow data/setup will be loaded into the new platform.